| Do you own/have any of these? (Partial list. See Virtual Gateway screens for complete lists.) |
|---|
| Burial  |
| Bank Account – Burial   |
| Burial Contract   |
| Holdings (Securities/Bonds, etc.)   |
| Annuities   |
| Bonds   |
| Savings Bonds   |
| Stocks  |
| Insurance   |
| Life Insurance  |
| Liquid Assets (Cash/Bank Accounts, etc.)  Checking Account  Savings Account                   |
| Motor Vehicles/Vehicles   |
| Pensions/Retirement Accounts, etc   |
| Annuity   |
| IRA   |
| Pension   |
| Property  |
| Principal Residence   |
| Real Estate - Business  |
| Real Estate - Personal  |
| Did you Transfer any assets during the past three (3) months?                                 |